



Photo: ©Moldova Fruct

A path between vines, with dark grapes hanging under green leaves.

CASE STUDY

AGGREGATION BUSINESS MODELS & GLOBALGAP CERTIFICATION IN THE REPUBLIC OF MOLDOVA

The Role of Group Formation in Accessing EU Markets

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1 SUMMARY

Moldova's table grape sector faced a severe crisis when traditional eastern export markets collapsed due to regional geopolitical instability, forcing a rapid reorientation toward the European Union. Small family farms struggled to meet stringent European standards independently. The OPTIM project, implemented by Helvetas Moldova with support from the Swiss Agency for Development and Cooperation, used a market systems development approach to catalyse transformation.

Through study visits, facilitated workshops, and technical mentorship, OPTIM enabled the Moldova Fruct association to help producers form two aggregation groups anchored by experienced exporters. Later, this collective action allowed small farms to achieve GlobalGAP certification. By December 2025, the groups exported over 1,700 tons to EU markets, achieved a 24% turnover increase, created 153 seasonal jobs, and attracted widespread media attention.

Using Outcome Harvesting with AAER (Adopt, Adapt, Expand, Respond) and Six Conditions frameworks, the case demonstrates a spiral of systemic change: producers adopted new practices, adapted certification requirements, and expanded the model to new sectors, including dried plums. Crucially, OPTIM acted as a facilitator, strengthening system without becoming its permanent actor and enabling market players to own the change. This experience offers a replicable blueprint for integrating small producers into high-value value chains, turning an external challenge into an opportunity for sustainable development.

2 CONTEXT

For the Republic of Moldova, agriculture is not merely an economic sector – it is a social and cultural pillar. With over 2.48 million hectares of agricultural land, rich black soils covering 75% of the territory, and a moderate continental climate, the country possesses exceptional natural conditions for horticulture.¹ The fruit-growing sector alone accounts for around 40% of agricultural production value, with table grapes concentrated in the southern rayons², including Cahul and Taraclia.³ Yet for decades, the market system for table grapes operated along a simple, low-value trajectory: producers sold to intermediaries who exported east.

When Russia's full-scale invasion of Ukraine began in February 2022, global food prices surged, and Moldova's traditional export routes through the Black Sea were blocked. Transport costs for Moldovan exporters soared by an estimated 180%, while the cost of key agricultural inputs – fertilizers and fuel – rose dramatically.⁴ For fruit and grape producers, the impact was compounded by the collapse of their primary eastern market: between 2021 and 2024, Russia's share of Moldovan grape exports plummeted from 48% to 6%, while the European Union's share surged from 36% to 74%.⁵ This sudden reorientation exposed a fundamental weakness in the market system: to access European markets, producers had to meet stringent standards and requirements. For small family farms, complying alone was almost impossible: according to a recent study, about a fifth found certification too costly, a small share too complicated, while the majority of small farms rated their marketing situation as very difficult.⁶

¹ <https://eba.md/uploaded/publications/Agiculture%20Report.pdf>

² In Moldova, a rayon (Romanian: raion) is a second-level administrative division, equivalent to a district or county.

³ <https://eba.md/uploaded/publications/Agiculture%20Report.pdf>

⁴ https://www.german-economic-team.com/wp-content/uploads/2022/09/GET_MDA_PS_05_2022.pdf

⁵ <https://www.freshplaza.com/oceania/article/9682923/moldova-s-grape-exports-to-eu-surge-to-74-percent-doubling-in-value/>

⁶ <https://www.iamo.de/fileadmin/documents/dp199.pdf>

3 OPTIM INTERVENTION

To address these constraints, the Swiss Agency for Development and Cooperation (SDC) launched the “Opportunities through Technologies and Innovation in Moldova” (OPTIM) project, implemented by Helvetas Moldova. Its overall goal is that Moldovan women and men, including excluded groups, benefit from better economic opportunities and improved working conditions. Specifically, the project works with private sector actors to increase their competitiveness, access higher-value markets, such as the EU and EFTA, and improve the quality of their job offers, while also helping people increase their employability through better skills and career information. In the agri-food sector, OPTIM uses a market systems development approach – facilitating partnerships, testing innovative models, and scaling what works, without becoming a permanent part of the system.



Photo: © Moldova Fruct

Two women pick grapes, with full crates between the vine rows.

4 METHODOLOGY: HARVESTING CHANGE THROUGH OUTCOME ANALYSIS

To understand and document the transformation, the OPTIM project employed *Outcome Harvesting*, a qualitative methodology suited for complex, non-linear interventions.⁷ To support this work, the project developed a guide on applying Outcome Harvesting within OPTIM, which outlines the process of harvesting outcomes through desk review and using ongoing outcome identification as a monitoring methodology. This guide informed the systematic desk review and the continuous capture of emerging changes throughout the project period. Unlike traditional monitoring that measures pre-set indicators, outcome harvesting asks: *What changed? Who changed? What did they do differently? How did our intervention plausibly contribute?* The process involved a systematic desk review of quarterly Moldova Fruct partner reports (Q4 2024 – Q4 2025), consultant progress reports, participant lists, and media publications. From these sources, we identified 22 observable changes in the behaviour of external actors, including producers, exporters, consultants, and media, that were plausibly influenced by the project.

Each outcome was formulated with a specific date or month, actor, and action, and then categorized using the AAER (Adopt, Adapt, Expand, Respond)⁸ framework to assess the depth of systemic change and the Six Conditions of Systems Change (Policies, Practices, Resource Flows, Relationships & Connections, Power Dynamics, Mental Models),⁹ to understand what dimension of the system was shifting. The harvest revealed a coherent chain of causality, from a study visit to Italy to group formation, capacity building, certification, and finally market results. Parallel pathways emerged for dried plums and equipment purchases. The following sections narrate this journey through the lens of the AAER framework. This narrative is an attempt to trace how catalytic interventions trigger a spiral of systemic

⁷ <https://www.betterevaluation.org/methods-approaches/approaches/outcome-harvesting>

⁸ <https://www.enterprise-development.org/wp-content/uploads/m4pguide2015.pdf>

⁹ https://www.fsg.org/resource/water_of_systems_change/

change, from the first pilots (Adopt stage) to sustained investment by early adopters (Adapt stage), to replication by other actors (Expand stage).¹⁰

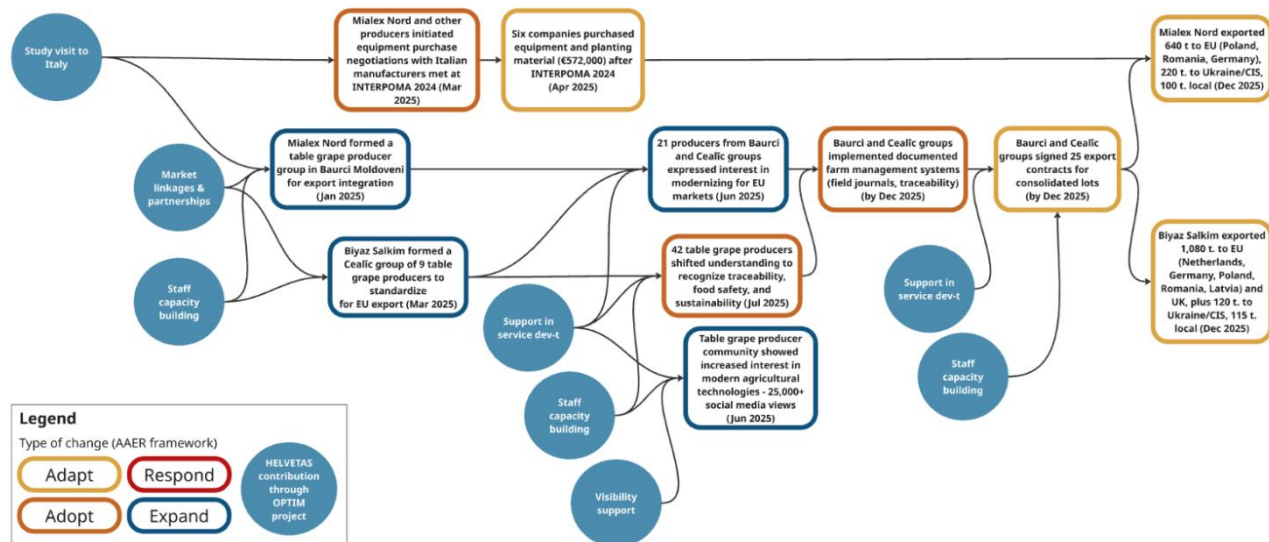
5 EXPOSURE TO BEST PRACTICES (ADOPT)

In November 2024, OPTIM supported 31 participants from 17 companies to go for a study visit to Italy. They attended INTERPOMA 2024, engaged in B2B meetings with equipment suppliers, and learned about digital orchard management. This exposure to modern technology and cooperative models planted the idea that working together could open EU markets. As a direct result, the producers initiated negotiations to purchase machinery, and six companies (*Dodu Farm, Agro Compact, Velfruct Prim, Farm Prod, Mialex Nord, and Ampelos Plus*) purchased equipment and planting material worth €572,000. In AAER terms, this was Adopt – new behaviours tried for the first time with project support. The deeper shift was in the ways of thinking or mental models: producers saw that group, not individual effort, was the way forward. Notably, there was an observable shift in the flow of resources, as businesses invested their own funds in purchasing equipment.

For every €1 spent by OPTIM to support November 2024 study visit to Italy, Moldovan agricultural producers invested €63.5 in equipment for their businesses.

6 BUILDING AGGREGATION MODELS: GROUP FORMATION (ADOPT-ADAPT-EXPAND)

OPTIM – Table Grape & Horticulture Producer Groups: Adopt, Adapt, Expand and Export to EU Markets



Visualization of OPTIM Outcomes - Moldova Fruct # 1

Following the study visit, Moldova Fruct, with OPTIM's support, shifted from exposing producers to new ideas to facilitating the collective structures needed to act on them. The association organized two needs-assessment workshops – one on 23 October 2024 in Baurci Moldoveni (Cahul rayon) and another on 22 November 2024 in Costești (Ialoveni rayon). These workshops were designed not as passive information sessions but as structured dialogues where producers could articulate the barriers

¹⁰ To learn more about the analytical frameworks, please see Annex 1

they faced and begin to envision solutions together. They brought together 18 producers from 16 companies. Through facilitated discussion, they identified a set of common, system-level constraints: inconsistent production technologies that led to uneven quality and calibre; divergent pesticide and fertilizer regimes that resulted in varying Maximum Residue Limits (MRL) levels across lots; widespread lack of irrigation and access to water; and the absence of GlobalGAP certification, which made EU market access impossible. These were not problems any single farm could solve alone.

The crucial role of Moldova Fruct was to create a space where producers could recognize that their individual difficulties were, in fact, shared systemic failures and where experienced exporters could see an opportunity to lead. At the workshops, the founder of *Mialex Nord*, offered to anchor a group in Baurci Moldoveni. Shortly thereafter, another exporter, *Biyaz Salkim* from Cealîc (Taraclia rayon, also situated in the South of Moldova), formed a group of nine table grape producers. Already by the end of March 2025, both groups were formed.

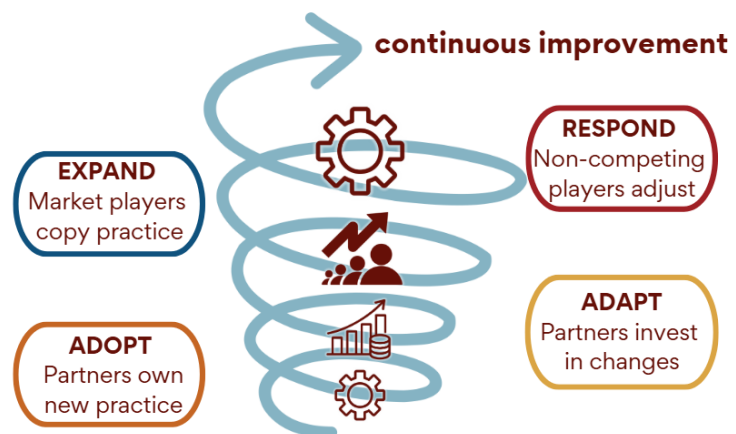
This process was not about imposing a ready-made solution, it was about facilitating the conditions for new relationships to emerge organically. The experienced exporters were catalysed by the workshops to see that aggregating small producers around their existing export channels could solve the quality, volume and certification problems that had kept them from accessing EU markets. The exporters provided the market knowledge and commercial incentives, while the producers brought the land, the labour, and the willingness to standardize. The new aggregation model, being informal but functional, created relationships and connections that previously did not exist.

Through the lens of AAER framework, this was Expand: the aggregation model was adapted to the Moldovan context and replicated in two locations. The shift in relationships and connections among small producers was the essential enabler: new value chain linkages formed between exporters and producers, and new horizontal linkages emerged among producers who had previously operated in isolation. To achieve this, OPTIM supported Moldova Fruct business association to act as enabler or facilitator – catalysing connections without becoming part of the system, a core principle of market systems development.

The groups translated their new capabilities into commercial success. In December 2025, *Mialex Nord* exported 640 tons to EU markets and *Biyaz Salkim* exported 1,080 tons to five EU countries and the UK. Turnover rose 24%, wages grew 11.5%, and 153 seasonal workers were employed. The success attracted wide media attention: thirteen outlets covered the certification and first EU exports. This marked transition to Expand category, when the story of these nine producers spread beyond the immediate participants, creating a new narrative around Moldovan agricultural success. The spiral was complete: from interest to action, from individual effort to collective certification, from local fields to European markets.

In 2025 agricultural season, **18 companies** in two producer groups recorded a **24% increase in turnover**, from 21 mln. MDL (108 mln. EUR) in 2024 to 27.5 mln. MDL (1.41 mln. EUR) in 2025.

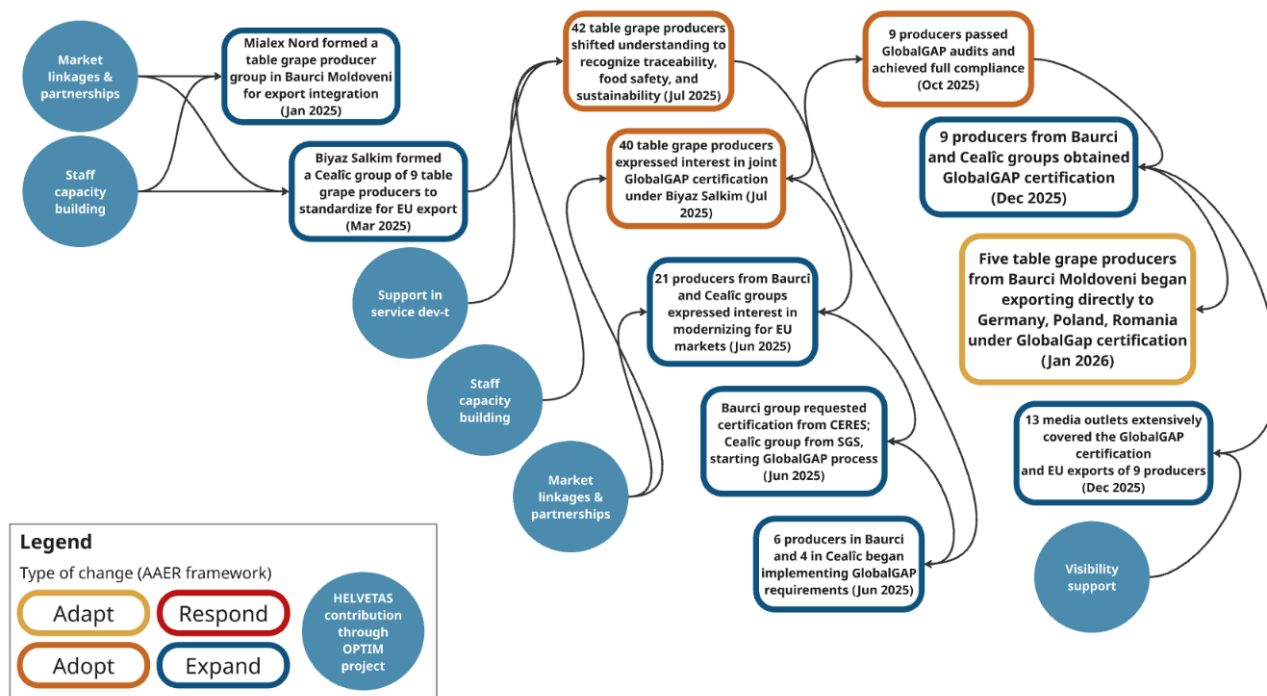
Spiral of Systemic Change



System change model per AAER framework

7 FROM INTEREST TO CERTIFICATION: THE SPIRAL OF SYSTEMIC CHANGE (ADOPT - ADAPT - EXPAND)

OPTIM – Table Grape Producers: Adopt, Adapt, Expand through GlobalGAP Certification



Visualization of OPTIM Outcomes - Moldova Fruct # 2

With producer groups already anchored by experienced exporters, the next phase of transformation focused on building technical and organizational capacity to meet EU market requirements. Between April and June 2025, Moldova Fruct, with OPTIM's support, delivered three high-visibility events: a three-day GlobalGAP training, a field workshop on green operations, and an experience exchange at *Mialex Agro*. These events attracted 63 participants, including 21 producers from both groups. By June 2025, all these producers had expressed clear interest and demonstrated capacity to modernize for EU markets. In terms of AAER framework, this was Expand – the interest in modernization spread beyond the initial core group.

The next step required producers to translate awareness into action. By June 2025, six companies in the *Baurci* group and four in the *Cealic* group began putting GlobalGAP requirements into practice, supported by ongoing technical mentorship. This marked the Adopt stage for the broader group: new practices were replicated and scaled with project support. The shift was not merely technical; it was also a change in mental models. Producers began to understand that standardization, traceability, and hygiene were not burdens but prerequisites for market access.

A crucial milestone came when the groups moved from internal preparation to formal engagement with certification bodies. By June 2025, the *Baurci*

"I own six hectares of table grapes and own a storage facility, and GlobalGAP certification has changed the way we work. As a group, we managed to standardize treatments, keep proper records, and comply with all procedures, from hygiene to traceability. This allowed us to obtain quality produce that the exporter can deliver directly to Germany or Poland."

Producer, Family Farm Nicolae Ștefan, Ursoaia, Cahul.

Source: Ziarul de Gardă, publication of December 16th, 2025.

group requested a certification quotation from *CERES GmbH*, and the *Cealîc* group from *SGS Moldova*, formally starting the GlobalGAP certification process. This was the Adapt stage, because they invested their own time and effort to move the process forward.

While the *Baurci* group focused on implementation, the *Cealîc* group underwent a parallel, deeper transformation. At a July experience exchange at *Biyaz Salkim's* vineyards, 40 producers adopted a collective action mindset, expressing interest in joint certification, while 42 producers demonstrated a clear shift in professional understanding, recognizing traceability, food safety, and sustainable resource management as essential. These were Adopt stage changes – new mental models translated in behaviour change for the first time.

Given that certification was secured, five producers from the *Baurci* group began exporting their grapes directly to Germany, Poland, and Romania without intermediaries. The success attracted wide media attention: thirteen outlets covered the certification and first EU exports. If viewed through the lens of AAER framework, this was Expand. Because the success story spread beyond the immediate participants, creating a new narrative around Moldovan agricultural success. The spiral of systems change came full circle: from interest to action, from individual effort to collective certification, from local fields to European markets.



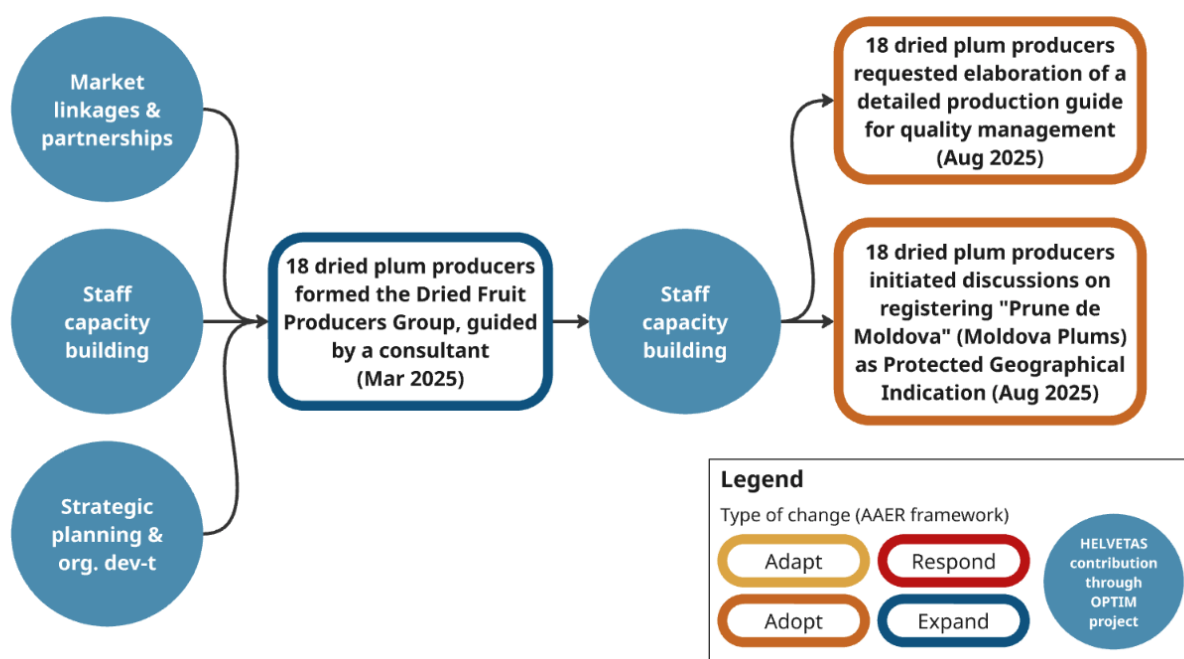
Photo: © Moldova Fruct

Producers at a field seminar on pergola vines hosted by Moldova Fruct. June, 2025.

8 DRIED PLUM PRODUCERS: A PARALLEL PATHWAY WITH SIMILAR POTENTIAL

In early 2025, 18 dried plum producers formed a formal group guided by technical expert and consultant. This was an Expand stage change, as the aggregation model, already tested with table grapes, was adapted to a new sector. The group's initial capacity-building program included a market study, a strategy workshop, and an exchange visit to FRUITMOL GROUP, where producers learned about modern drying technology. These activities laid the groundwork for a shift in mental models: producers began to see standardization as essential for export. August 2025 marked a turning point for the group. At a workshop hosted by *Exclusive Garden*, the group requested a detailed production guide covering the entire value chain, from harvest to final delivery, including hygiene and quality control parameters. In the same session, they initiated discussions on registering "Prune de Moldova" as a Protected Geographical Indication, inspired by the French "*Pruneaux d'Agen*" model. Both were Adopt stage changes: new approaches to quality management and collective branding tried for the first time. While this group has not yet reached certification or export, its trajectory mirrors the early steps of the table grape groups that later succeeded. The shift from informal practices to structured quality systems and the emergence of a collective branding vision suggest that the dried plum sector has the potential to follow a similar pathway toward high-value markets. OPTIM team will continue tracking progress within the group of dried fruit producers.

OPTIM – Dried Fruit Group



Visualization of OPTIM Outcomes - Moldova Fruct # 3

9 CONCLUSIONS AND WAY FORWARD

The transformation of Moldova's table grape sector from a fragmented, low-value export channel to the new system, oriented to high-value markets offers a compelling example of systemic change in practice. Viewed through the AAER framework, the story is one of a spiral progression: Adopt – the study visit planted new ideas and triggered initial investments; Adapt – the groups invested their own resources in certification and commercialization; Expand – the model replicated across two producer groups and spread via media to a wider audience. Thus, the cycle was not a straight line, but a loop as new producers were inspired with learning, investment, and confidence building at every turn.

The Six Conditions of Systems Change framework analysis reveals the multi-dimensional nature of the shift. Practices evolved from informal, undocumented farming to traceability, documented management systems, and GlobalGAP compliance. Relationships & Connections were fundamentally reshaped: new horizontal ties among producers replaced isolation, and vertical linkages between small farms and experienced exporters created a credible supply chain. Mental Models shifted from individual effort to collective action, from a focus on volume to a focus on quality and safety, and from selling to intermediaries to direct export. Resource Flows followed: €572,000 in equipment purchases, over 1,700 tons of exports to EU markets, a 24% rise in turnover, and 153 seasonal jobs created.

Crucially, the project's role was that of a facilitator - but not by directly providing services. Instead, OPTIM raised capacities of systemic actors (Moldova Fruct in this case) to understand sector needs and respond efficiently by delivering the relevant support to businesses: market intelligence, access to technical mentorship, and facilitated dialogue spaces. The project ensured that these systemic actors were properly performing their primary systemic function, while never becoming part of the system itself. This allowed market players to own the change: exporters invested in logistics and quality control, producers adopted new practices, and certification bodies responded to group requests. OPTIM intervention addressed the root causes of market system failure, including fragmented production, missing certification, and weak linkages, so that the system could sustain itself.

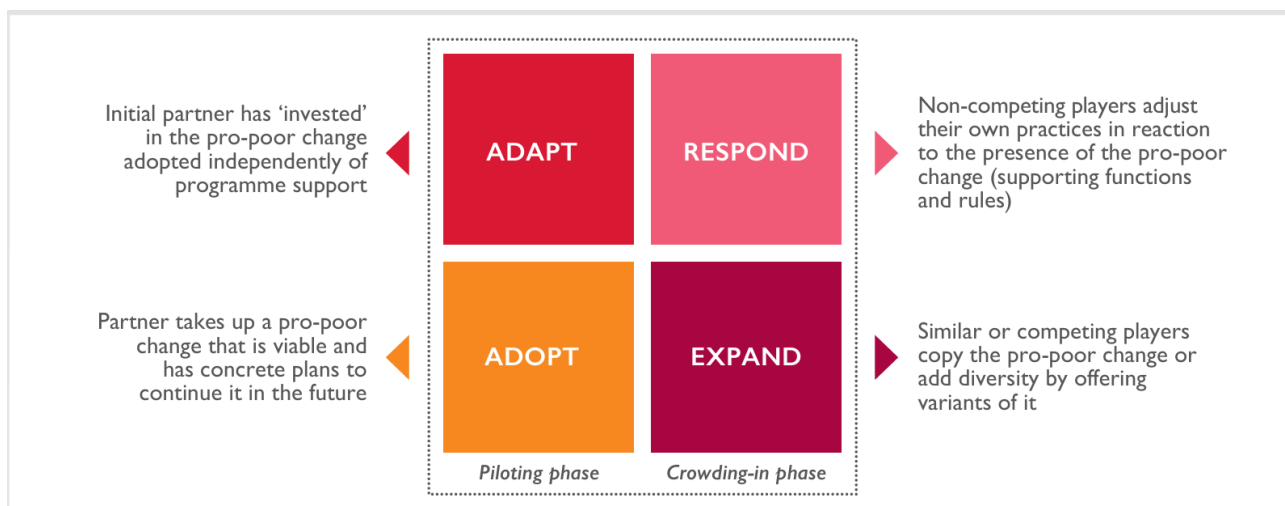
The parallel pathway of the dried plum group illustrates that the model is replicable. This is a concrete example of how OPTIM tests models, builds mechanisms, and supports the development and improvement of systemic functions that can benefit a wider range of sectors, not only table grapes. The same pattern of group formation, capacity building, and mindset shifts is evident, though the sector remains at an earlier stage. At the same time, the group's request for a detailed production guide and the initiation of Protected Geographical Indication (Indication Géographique Protégée or IGP) discussions signal that the dried plum producers are following a similar trajectory, with the potential to achieve certification and export in the future.

For the OPTIM project and Moldova Fruct, the way forward is to consolidate these gains while nurturing the emerging dried plum pathway. For the table grape groups, maintaining certification, expanding volumes, and exploring new market segments will be key. At the same time, for the dried plum sector, the next steps are to move from quality planning to certification and to translate IGP discussions into concrete action. More broadly, the experience offers a replicable blueprint for other agricultural sectors in Moldova – and beyond – that seek to integrate small producers into European value chains. The systemic change achieved shows that with the right facilitation, even the smallest farms can become competitive actors in high-value markets, turning a geopolitical crisis into an opportunity for sustainable development.

10 ANNEX 1 - ANALYTICAL FRAMEWORKS TO ANALYZE OUTCOMES

The Adopt-Adapt-Expand-Respond (AAER) framework is a tool for assessing the maturity of systemic change. It tracks how innovations move from initial uptake (Adopt) and partner-led investment (Adapt) to wider replication by other actors (Expand) and, ultimately, to adaptations in the supporting market system, such as policies (Respond).

The OPTIM Project Review recommended integrating AAER into learning practices. Within an Outcome Harvesting methodology, AAER provides an analytical lens. It moves beyond simply documenting *what* changed to classifying the *depth* of that change. This allows distinguishing between direct partner results and genuine, sustainable market-level shifts, ensuring learning efforts capture evidence of lasting systemic impact rather than just short-term project outputs.



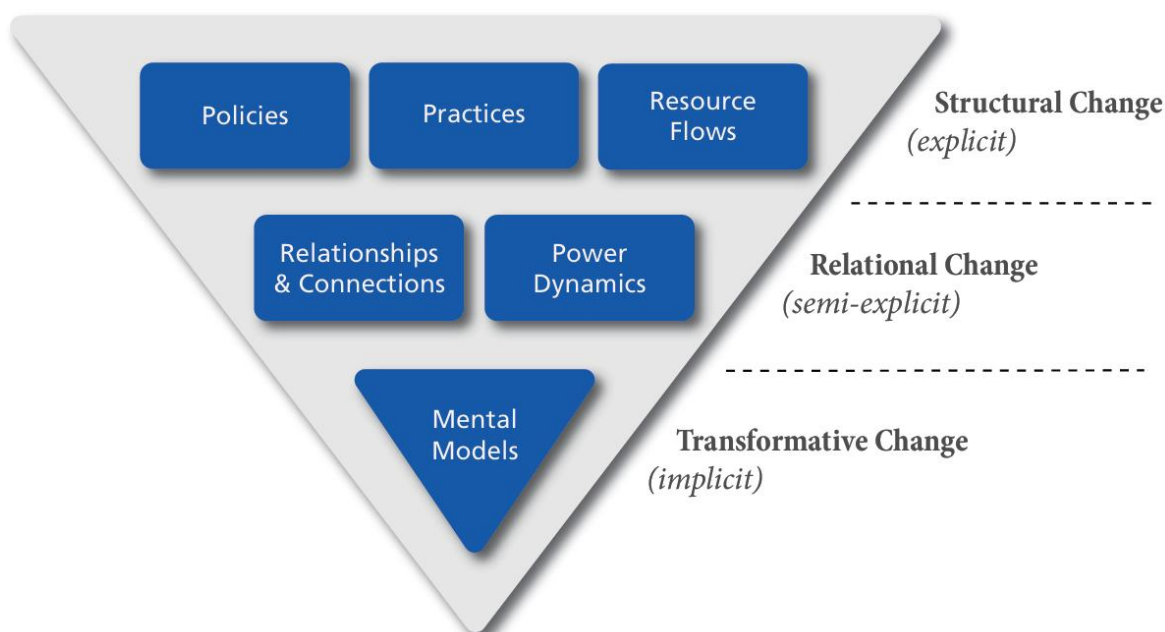
Systemic Change Framework.

Source: Springfield Centre (2015). The Operational Guide for the Making Markets Work for the Poor (M4P) Approach (2nd ed.). Swiss Agency for Development and Cooperation (SDC) and UK Department for International Development.

The Six Conditions of systems Change framework (Policies, Practices, Resource Flows, Relationships, Power Dynamics, Mental Models) complements AAER by providing a deeper analytical layer. While AAER tracks how change spreads (Adopt to Respond), the Six Conditions explain what is shifting within the system.

For Outcome Harvesting within OPTIM, this combined lens is highly valuable. It allows the project team to not only document that a change expanded (AAER), but also to analyse whether that expansion shifted underlying power dynamics or mental models. This addresses the OPTIM review's recommendation to deepen systemic analysis, while acknowledging the inherent limitations in observing, capturing, and registering change at the level of mental models.

Six Conditions of Systems Change



Shifting the conditions that hold the problem in place.

Source: Kania, J., Kramer, M., & Senge, P. (2018). The water of systems change. FSG.

